

Implementing CRM For Result Tracking Of A Candidate With Internal Marks - (DEV)

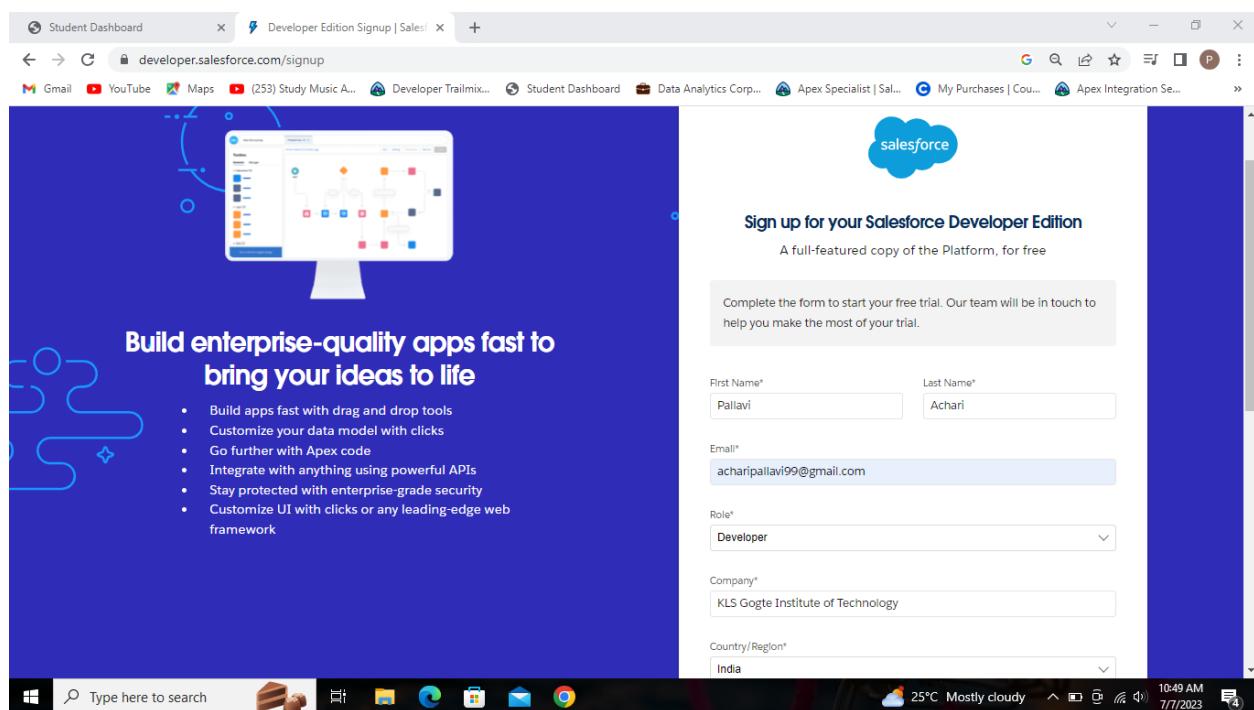
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1. Creating Developer Org :

What is Salesforce?

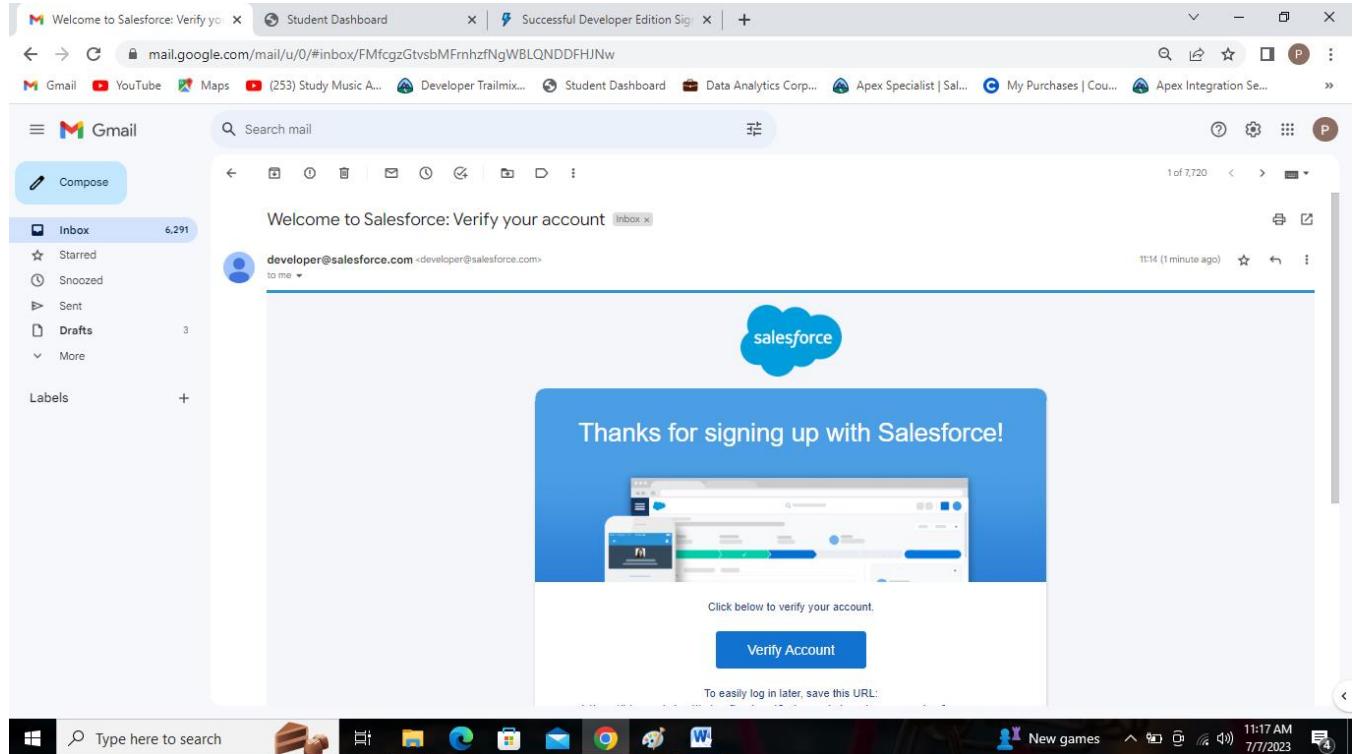
- Salesforce is your customer success platform, and it is meant to assist you in selling, servicing, marketing, analyzing, and connecting with your customers. Salesforce provides everything you need to run your business from any location. You may manage relationships with prospects and customers, interact and engage with employees and partners, and securely store business data in the cloud using standard products and services.
- We must first go to [developers.salesforce.com/](https://developer.salesforce.com/signup) and click the sign up option in order to build a developer organization. then enter all the information.



Sign up page for Developer Edition.

Account Activation :

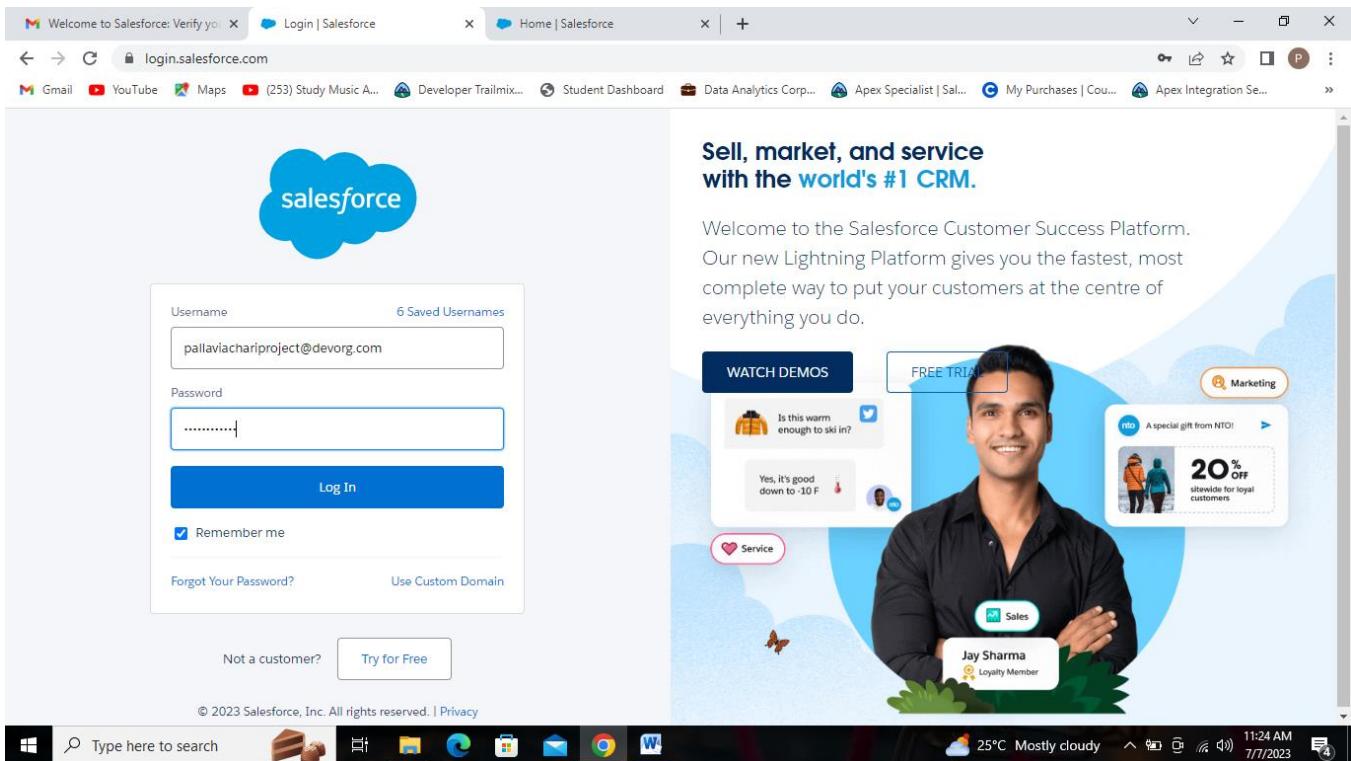
- Visit the inbox of the email account you used to register. To activate your account, click the "verify account" button.



Account activation email.

Login to Your Salesforce Account :

- Login at salesforce.com by clicking the login button and enter your newly established username and password.



Login Page

- Following is the home page you will view after logging in.

Home Page.

2. Object :

- Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:
 1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
 2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.
- Select Setup after clicking the gear icon. Just below the home tab, select the object manager tab. Located on the far right is a Create Dropdown menu. click there, then choose Custom Object.
- Make the object as described below:

Label: Semester

Plural Label: Semesters

Record Name: Semester Name

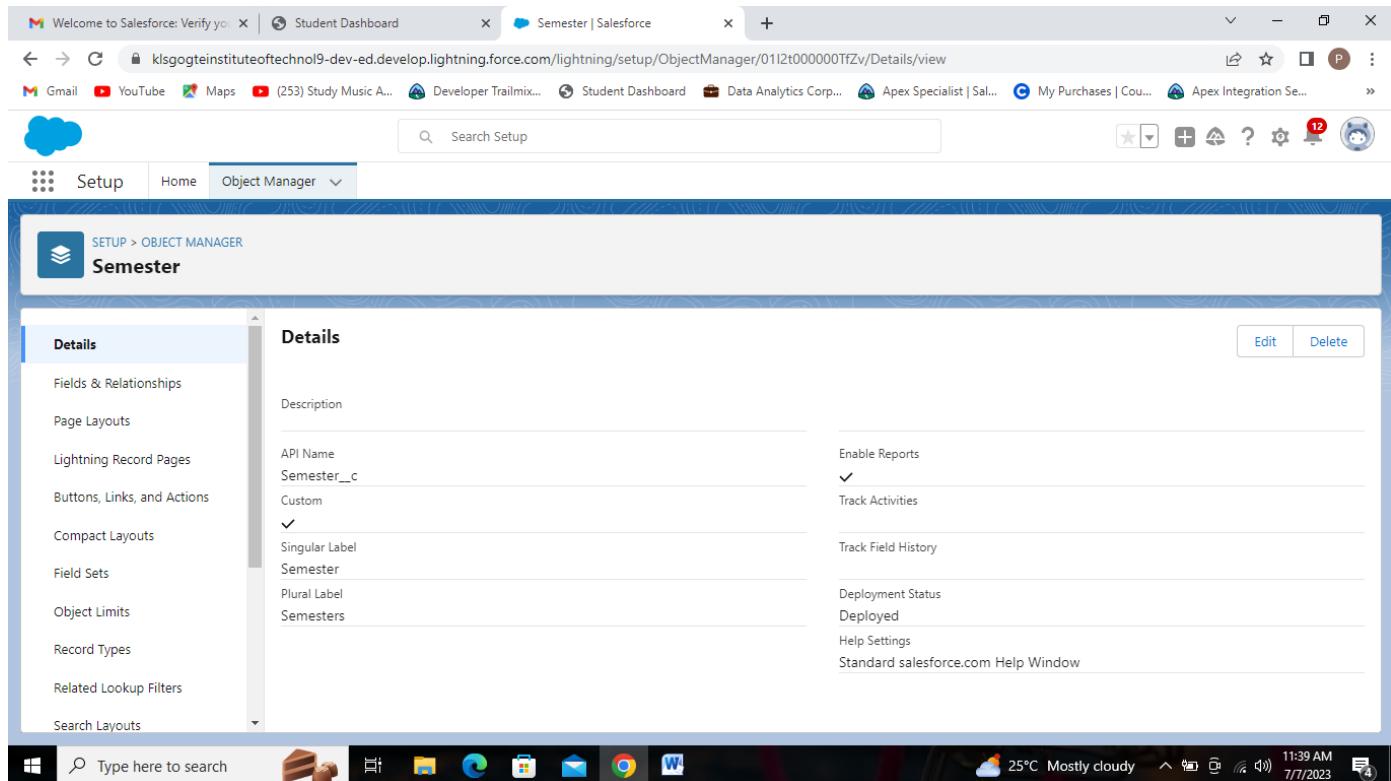
Check the Allow Reports

Check the Allow Search

Click Save.

- **Creation Of Semester Object For Candidate Internal Result Card :**

- Label: Semester
- Plural Label: Semesters
- Record Name: Semester Name
- Check the Allow Reports
- Check the Allow Search
- Click Save.



Semester Object.

- Create four additional objects in a similar manner, including Candidate, Course Details, Lecturer Details, and Internal Results.

- **Creation Of Candidate Object For Candidate Internal Result Card :**

- Label: Candidate
- Plural Label: Candidates
- Record Name: Candidate Name
- Check the Allow Reports
- Check the Allow Search
- Click Save.

The screenshot shows the Salesforce Setup interface with the following details:

Page Header: Welcome to Salesforce: Verify yo... | Student Dashboard | Candidate | Salesforce

Breadcrumbs: SETUP > OBJECT MANAGER

Section: Candidate

Details Panel:

- Description: (empty)
- API Name: Candidate__c
- Custom: ✓
- Singular Label: Candidate
- Plural Label: Candidates

Right Panel:

- Enable Reports: ✓
- Track Activities
- Track Field History
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Left Sidebar:

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Bottom Bar:

- Type here to search
- Windows Start button
- Taskbar icons: File Explorer, Edge, Google Chrome, Mail, Word
- System tray: Weather (25°C Mostly cloudy), Date (11:45 AM 7/7/2023), Battery, Network, Volume, Notifications (4)

Candidate Object.

- **Creation Of Course Details Object For Candidate Internal Result Card :**

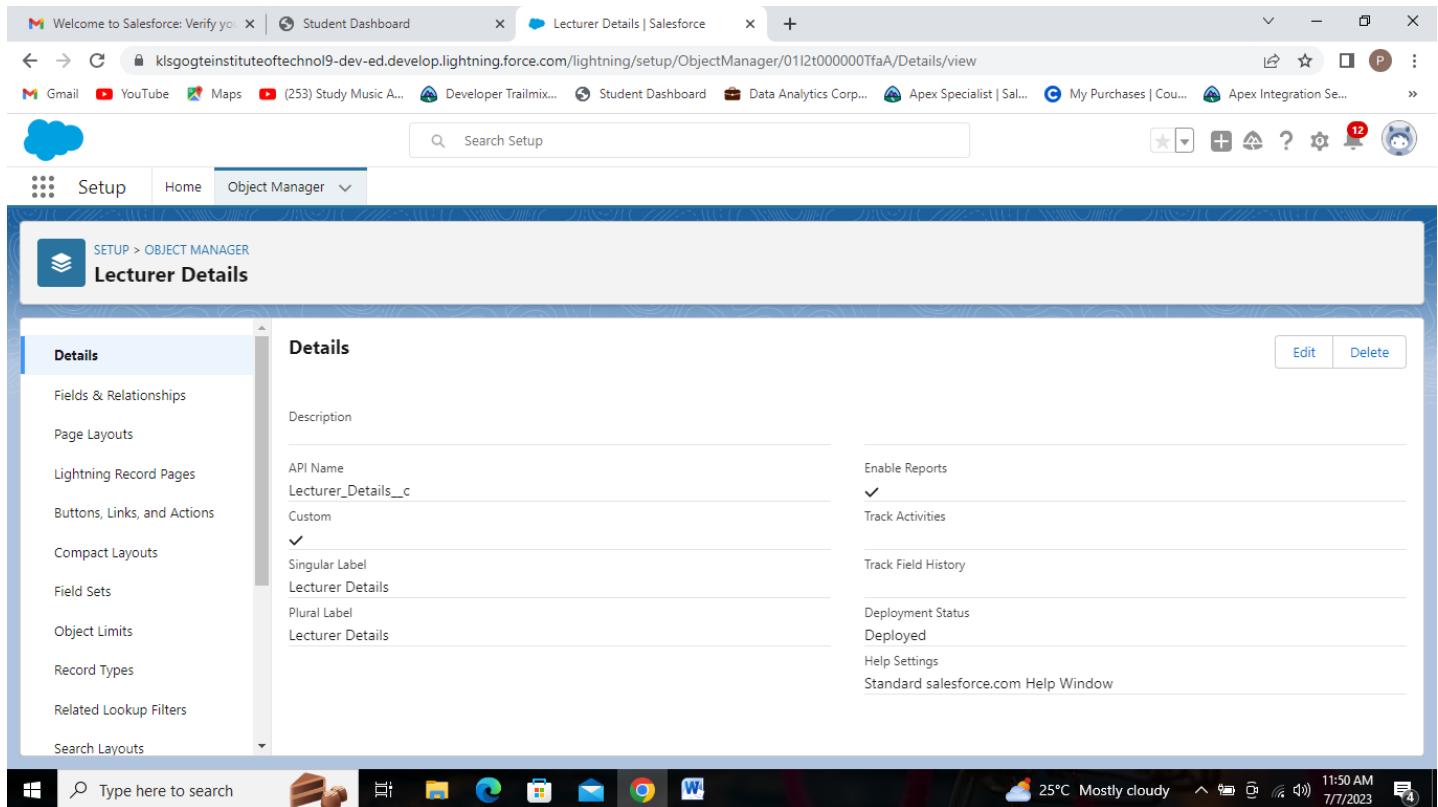
- Label: Course Details
- Plural Label: Course Details
- Record Name: Course Details Name
- Check the Allow Reports
- Check the Allow Search
- Click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Gmail, YouTube, Maps, Study Music A..., Developer Trailmix, Student Dashboard, Data Analytics Corp..., Apex Specialist | Sal..., My Purchases | Cou..., Apex Integration Se..., and a search bar labeled "Search Setup". The main area displays the "Course Details" object setup page under "SETUP > OBJECT MANAGER". The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The right panel shows the "Details" section with fields for Description, API Name (set to "Course_Details__c"), Singular Label (set to "Course Details"), Plural Label (set to "Course Details"), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (set to "Deployed"), and Help Settings (set to "Standard salesforce.com Help Window"). At the bottom, there are "Edit" and "Delete" buttons. The taskbar at the bottom of the screen shows the Windows Start button, a search bar with the text "Type here to search", and several pinned icons for Microsoft Word, Excel, and other applications. The system tray shows the date and time as "11:48 AM 7/7/2023".

Course Details Object.

- **Creation Of Lecturer Details Object For Candidate Internal Result Card :**

- Label: Lecturer Details
- Plural Label: Lecturer Details
- Record Name: Lecturer Details Name
- Check the Allow Reports
- Check the Allow Search
- Click Save.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Gmail, YouTube, Maps, Developer Trailmix, Student Dashboard, Data Analytics Corp., Apex Specialist | Sal..., My Purchases | Cou..., and Apex Integration Se... The main title is 'Lecturer Details | Salesforce'. The page header says 'SETUP > OBJECT MANAGER' and the object name is 'Lecturer Details'. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays the 'Details' tab for the 'Lecturer Details' object. It shows the following fields:

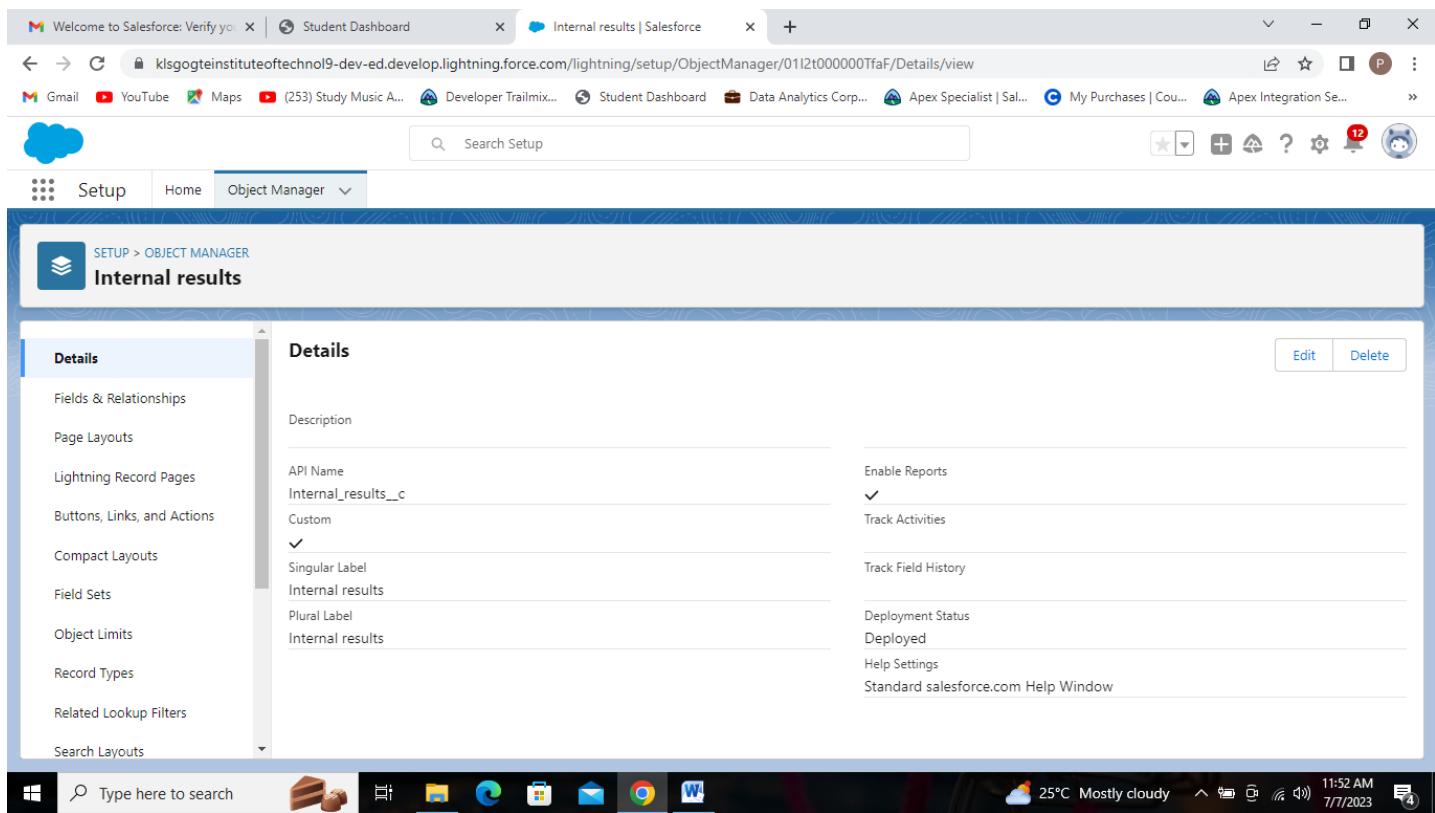
Field	Value
Description	
API Name	Lecturer_Details__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Lecturer Details
Plural Label	Lecturer Details
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main content area are 'Edit' and 'Delete' buttons. The bottom of the screen shows the Windows taskbar with icons for File Explorer, Task View, File, Mail, Google Chrome, and Word, along with system status indicators like battery level, signal strength, and date/time (11:50 AM, 7/7/2023).

Lecturer Details Object.

- **Creation Of Internal results Object For Candidate Internal Result Card:**

- Label: Internal results
- Plural Label: Internal results
- Record Name: Internal results Name
- Check the Allow Reports
- Check the Allow Search
- Click Save.



Internal results object.

3. Tab :

- Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

(A) **Standard Object Tabs:** Standard object tabs display data related to standard objects

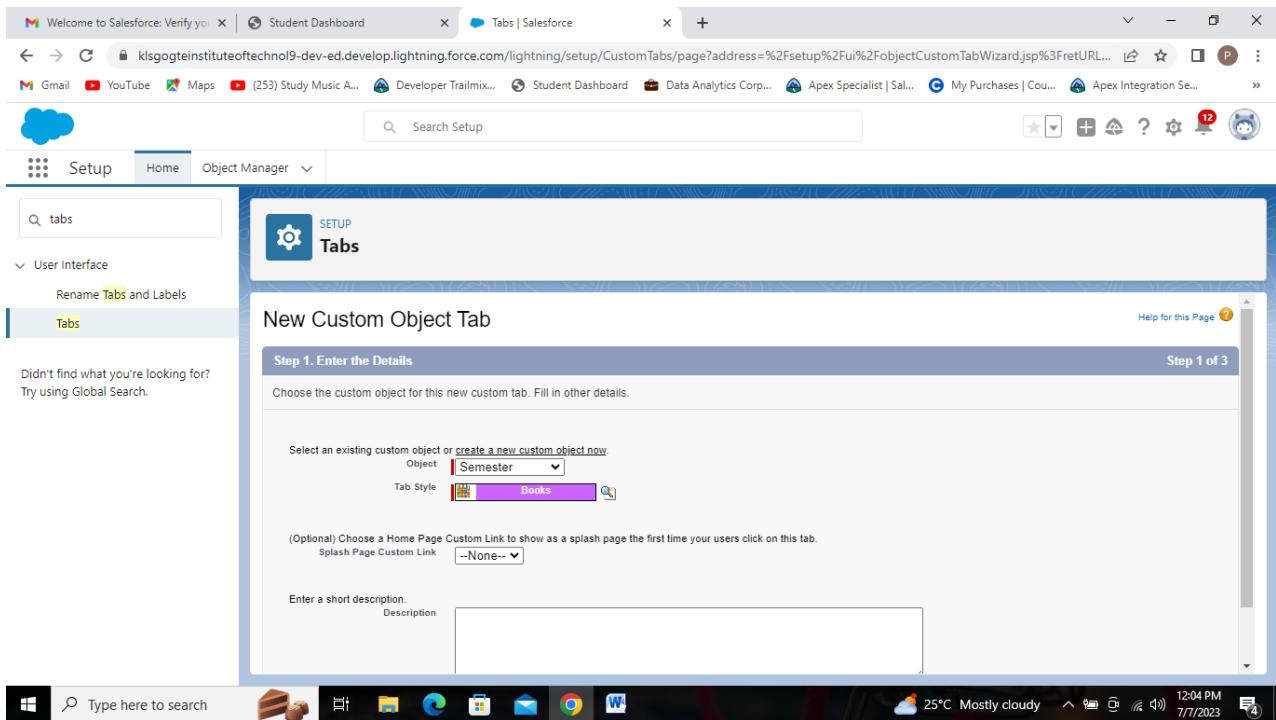
(B) **Custom Object Tabs:** Custom object tabs displays data related to custom objects.

(C) **Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tabs.

(D) **Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.

Creation Of Semester Tab :

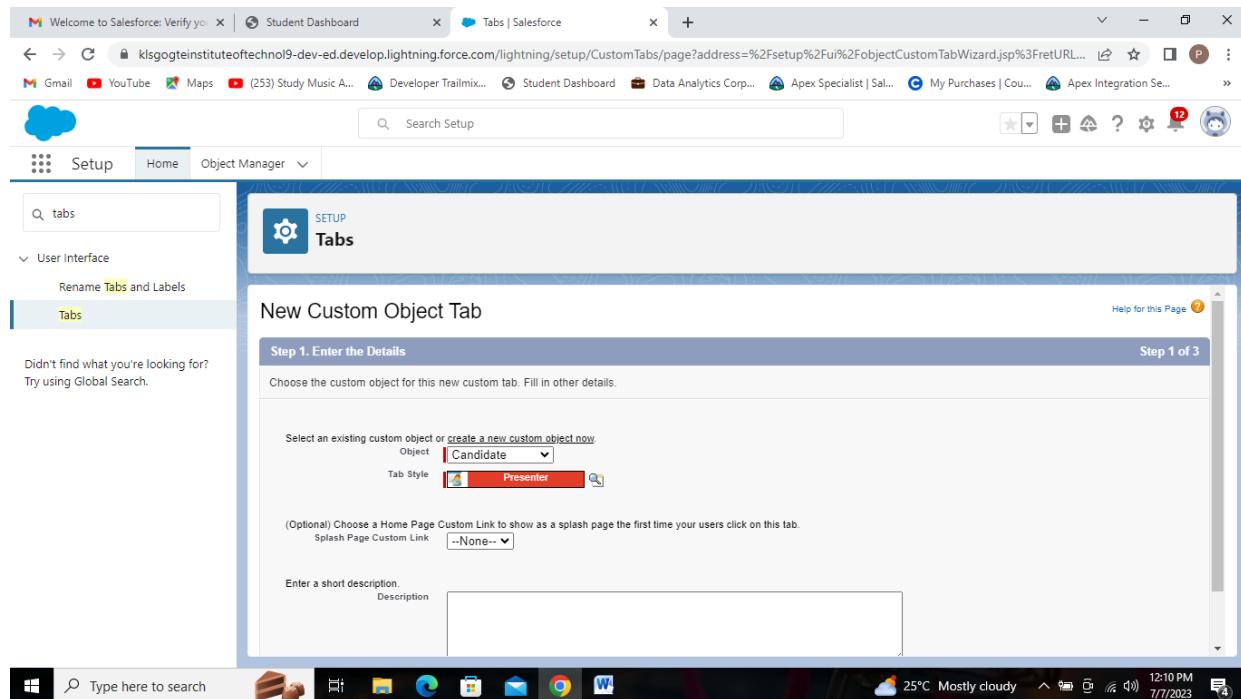
- To create custom object, first go to home page then enter Tabs in the Quick Find box and choose Tabs.
- Click New under Custom Object Tabs and Select Semester as the Object. Choose an icon for Tab Style.
- Leave all defaults as is. Click Next, Next, and Save.



Semester Custom Tab.

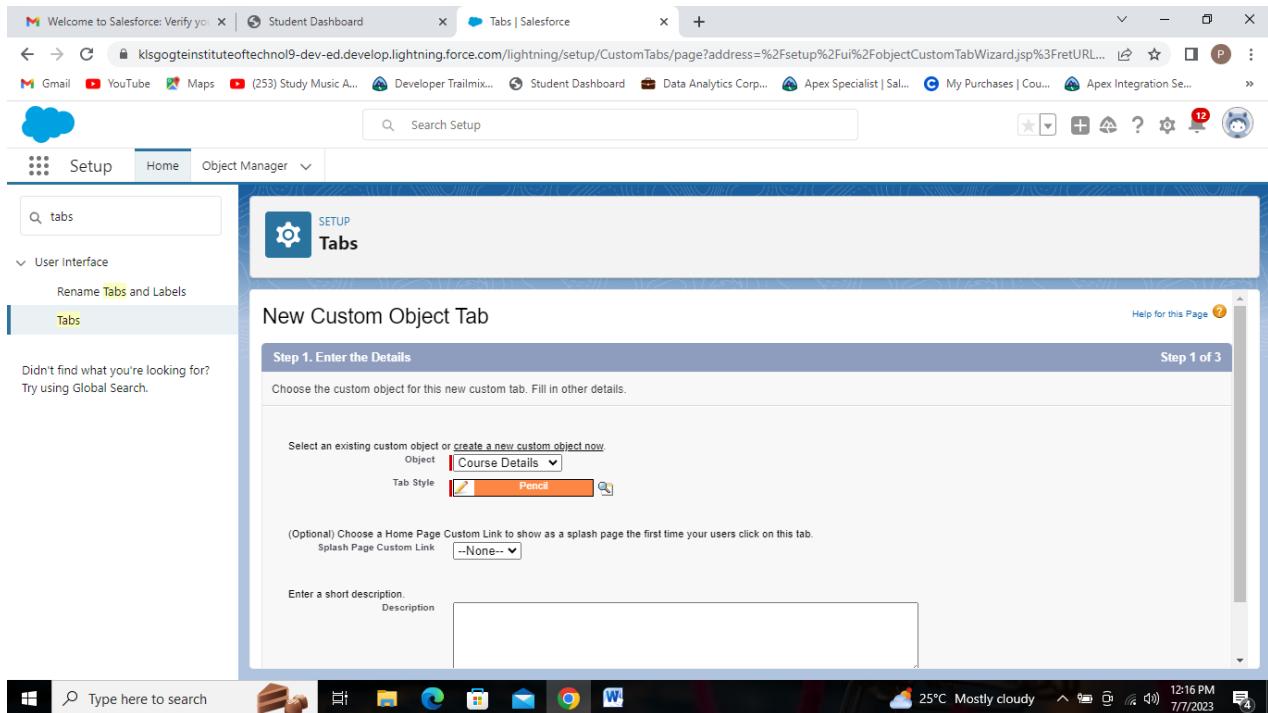
- Create Tabs for all Custom Objects, including Candidate, Course Details, Lecturer Details, and Internal Results.

Creation Of Candidate Tab :



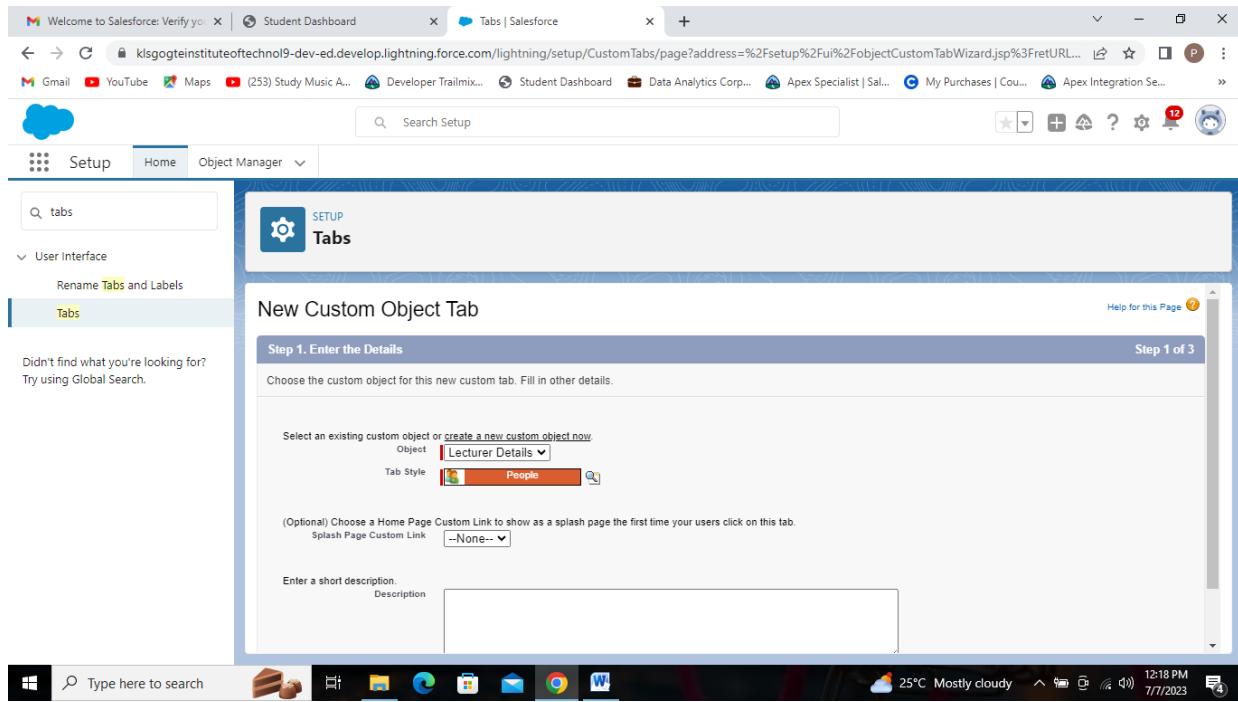
Candidate Custom Tab.

Creation Of Course Details Tab :



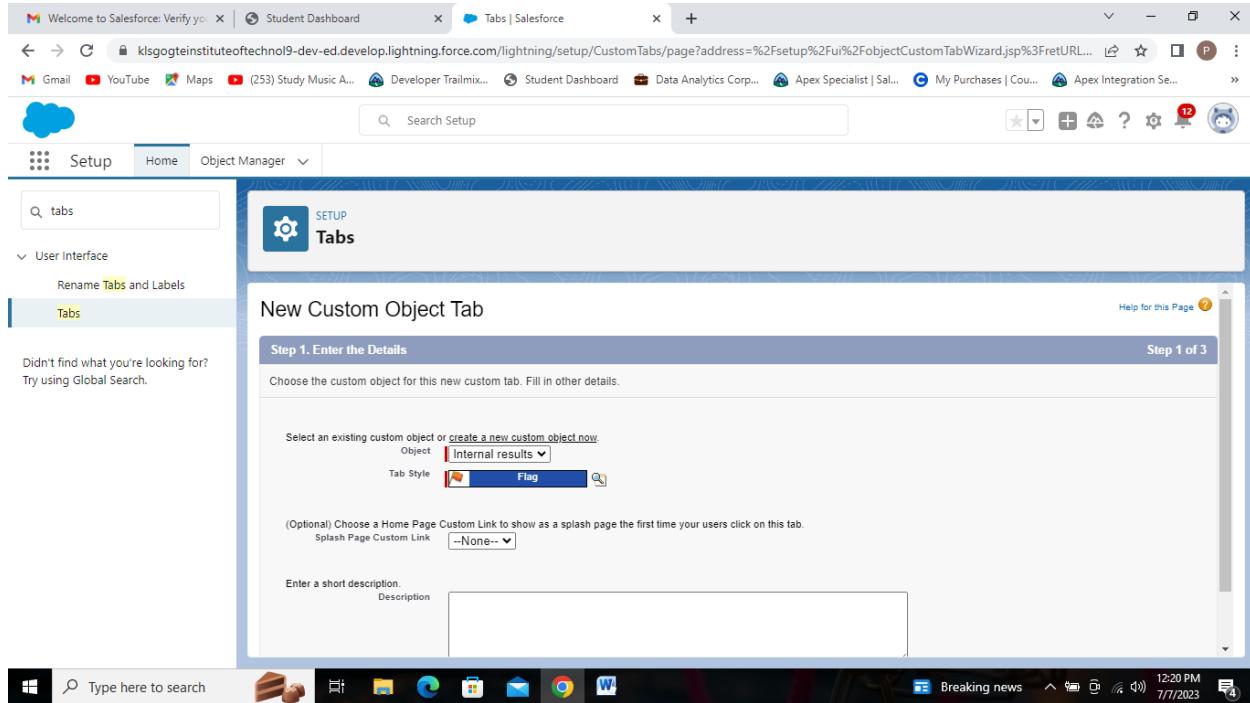
Course Details Custom Tab.

Creation Of Lecturer Details Tab :

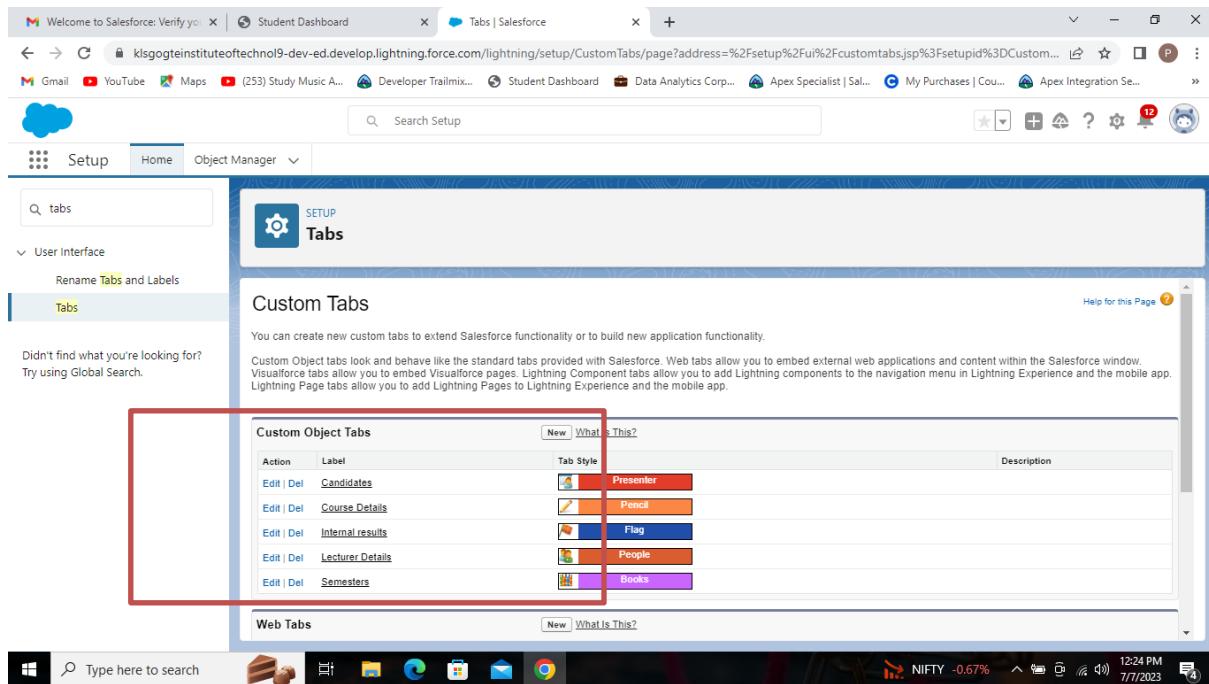


Lecturer Details Custom Tab.

Creation Of Internal results Tab :



Internal results Custom Tab.



The five custom tabs we created.

4. Lightning App :

- Apps in Salesforce are a collection of tabs that work together to help the application function. It features a unique name, logo, and set of tabs. The most basic program usually has only two tabs. There are two kinds of apps:
 1. Standard App: Standard apps include every instance of Salesforce by default. It has many functions such as Sales, Marketing, Community, call center, content, Salesforce chatter, App Launcher, and so on. The standard app's description, logo, and label cannot be changed.
 2. Custom applications: Custom applications are developed in response to the needs of the user. Custom Apps are created by combining regular and custom tabs. Custom Apps can have their logos altered.

Creating The Candidate Internal Result Card Lightning App.

- To create lightning app follow the below steps:

1.From Setup, enter App Manager in the Quick Find and select App Manager.

2.Click New Lightning App.

3.Enter Candidate Internal Result Card as the App Name, then click next

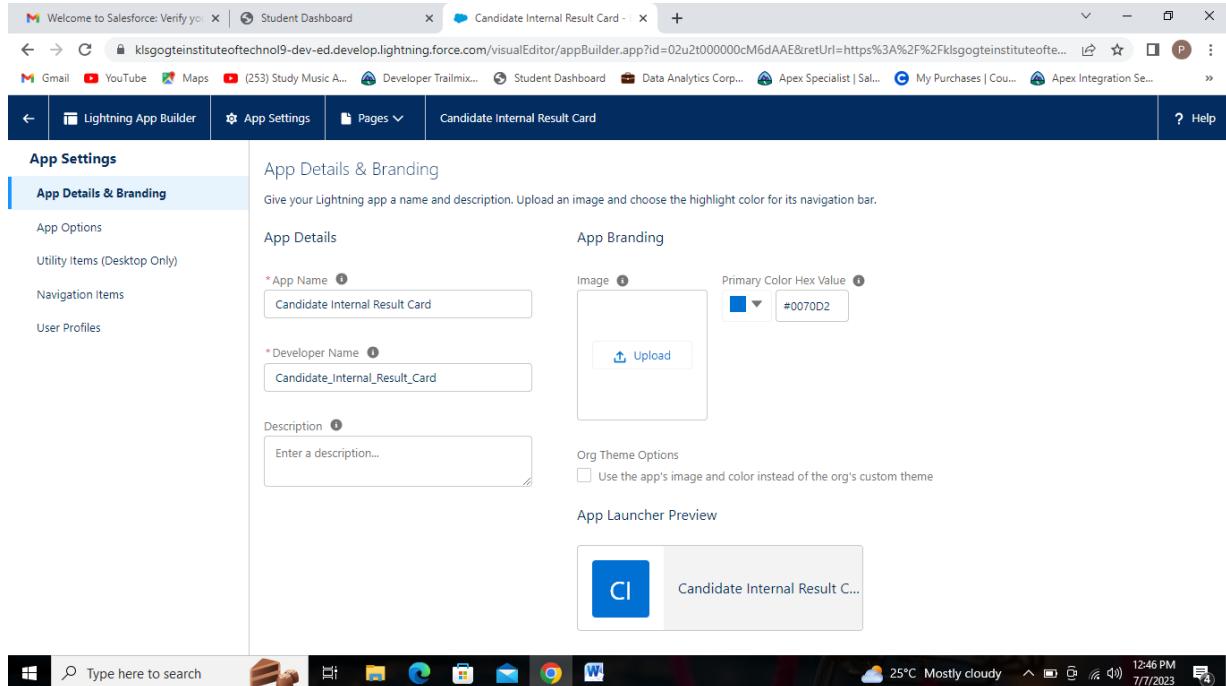
4.Under App Options, leave the default selections and click next.

5.Under Utility Items, leave as is and click Next.

6.From Available Items, select Semester, Candidate, Course Details, Lecturer Details, Internalresults, Reports, and Dashboards and move them to Selected Items.

7.Click Next.

From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



Give the app name as Candidate Internal Result Card.

The screenshot shows the 'Candidate Internal Result Card' page in the Lightning App Builder. On the left, the sidebar has 'App Settings' selected. Under 'Navigation Items', 'User Profiles' is selected. The main area is titled 'Navigation Items' and contains two sections: 'Available Items' and 'Selected Items'. The 'Available Items' section lists various navigation items like Accounts, Alert Settings, All Sites, etc. The 'Selected Items' section contains 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. A toolbar at the bottom includes icons for Home, Recent, and Help.

From Available Items, select Semester, Candidate, Course Details, Lecturer Details, Internal results, Reports, and Dashboards and move them to Selected Items.

The screenshot shows the 'Candidate Internal Result Card' page in the Lightning App Builder. On the left, the sidebar has 'User Profiles' selected. The main area is titled 'User Profiles' and contains two sections: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' section lists various user profiles such as Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Contract Manager, etc. The 'Selected Profiles' section contains 'System Administrator'. A toolbar at the bottom includes icons for Home, Recent, and Help.

From Available Profiles, select System Administrator and move it to Selected Profiles.

The screenshot shows a browser window with the URL klsgogteinstituteoftechno19-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/list?filterName=Recent. The page title is "Recently Viewed | Course Details". The main content is a table titled "Recently Viewed" showing course details. The table has columns: Course Name, Duration, and Created Date. The data is as follows:

	Course Name	Duration	Created Date
1	BCA	3	21/07/2023, 1:29 am
2	BSc	3	07/07/2023, 5:16 pm
3	BTech	4	07/07/2023, 5:15 pm
4	BE	4	07/07/2023, 5:14 pm
5	MCA	2	07/07/2023, 5:12 pm
6	MBA	2	07/07/2023, 5:09 pm

The browser interface includes a search bar, navigation buttons, and a toolbar with various icons. The taskbar at the bottom shows the Windows logo, a search bar, and several pinned application icons.

Candidate Internal result card Lightning App.

5. Fields And Relationship :

- Fields - Fields store data values that are required for a particular object in a record.
- An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.
- Following is the list of fields of object we have created.

Object Name	Field Name	Data type
Semester	Semester Name	<u>Text</u> (Standard field)
	Course	<u>Lookup</u> (Course Details)
Candidate	Candidate Name	<u>Text</u> (Standard field)
	Candidate Roll Number	Auto Number
	Semester Name	<u>Lookup</u> (Semester)
Lecturer Details	Lecturer Name	<u>Text</u> (Standard field)
	Lecturer Role	Text
	Course	<u>Lookup</u> (Course)
Course Details	Course Name	<u>Text</u> (Standard field)
	Duration (Years)	Number

Internal results	Candidate	Lookup (candidate)
	Candidate Roll Number	Formula
	Course	<u>Lookup</u> (Course)
	Marks	Number

Creation Of Fields For The “Semester” Object :

The screenshot shows the Salesforce Setup interface for the Semester object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled "Fields & Relationships" and displays five items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course__c	Lookup(Course Details)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Name	Text(80)		✓

Fields of semester object.

Creation Of Fields For The “Candidate” Object :

The screenshot shows the Salesforce Setup interface for the Candidate object. The left sidebar lists various setup categories. The main content area is titled "Fields & Relationships" and displays six items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Name	Name	Text(80)		✓
Candidate Roll Number	Candidate_Roll_Number__c	Auto Number		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_Name__c	Lookup(Semester)		✓

Fields of Candidate object.

Creation Of Fields For The “Lecturer Details” Object :

The screenshot shows the Salesforce Object Manager interface for the "Lecturer Details" object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays a table titled "Fields & Relationships" with 6 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course__c	Lookup(Course Details)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Lecturer Name	Name	Text(80)		✓
Lecturer Role	Lecturer_Role__c	Text(40)		
Owner	OwnerId	Lookup(User,Group)		✓

Fields of Lecturer Details object.

Creation Of Fields For The “Course Details” Object :

The screenshot shows the Salesforce Object Manager interface for the "Course Details" object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays a table titled "Fields & Relationships" with 5 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Detail Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Duration	Duration__c	Number(18, 0)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Fields of Course Details object.

Creation Of Fields For The “Internal results” Object :

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' section selected. The main area displays a table titled 'Fields & Relationships' with 9 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate	Candidate__c	Lookup(Candidate)		✓
Candidate Roll Number	Candidate_Roll_Number__c	Formula (Text)		▼
Course	Course__c	Lookup(Course Details)		▼
Created By	CreatedById	Lookup(User)		
Internal Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		▼
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Text(15)		▼

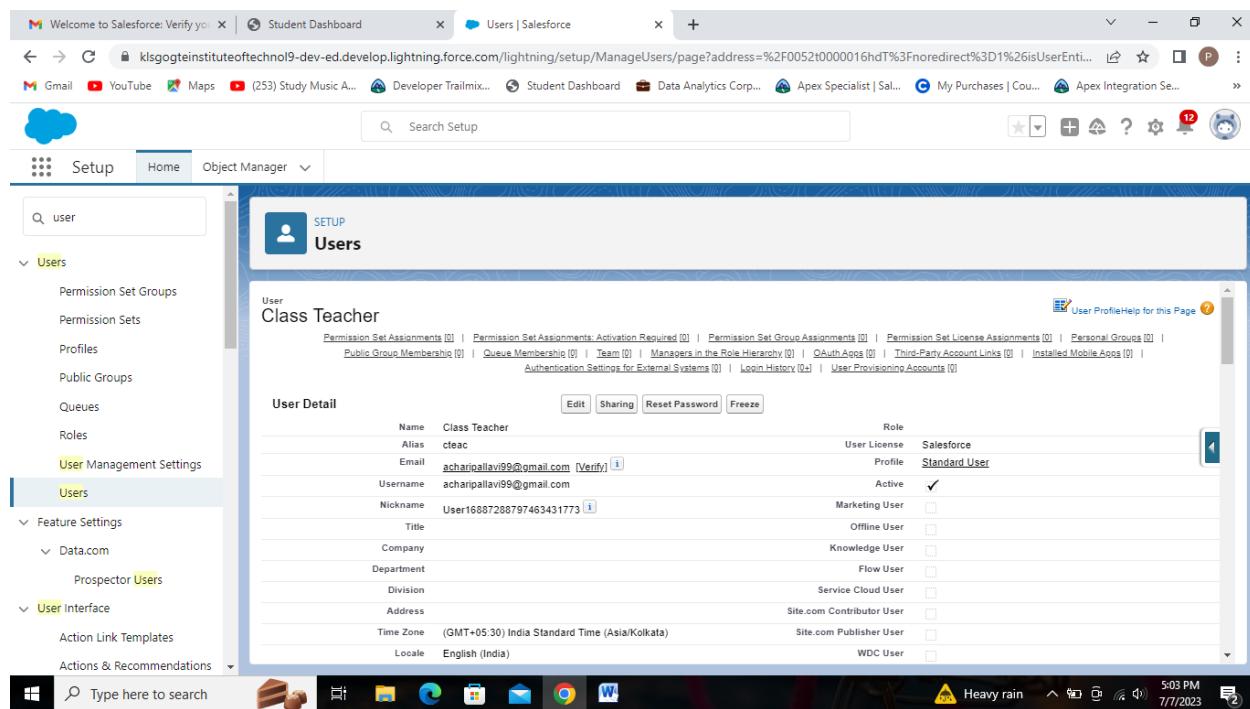
Fields of Internal results object.

6. Users :

- A Salesforce user is someone who logs in. Users are personnel at your organization who require access to the company's records, such as sales representatives, managers, and IT professionals. Every Salesforce user has a user account.

Creating A User :

- Enter Users in the Quick Find box from Setup and select users.
- Click New User and enter the First Name as Class, Last Name as Teacher and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- Select a User License as salesforce.



Creating user named 'Class Teacher'.

7. Creating Record Course Details Records :

- Creating course Details record for course MBA.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for Gmail, YouTube, Maps, Developer Trailmix, Student Dashboard, Data Analytics Corp., Apex Specialist | Sal., My Purchases | Cou..., and Apex Integration Se... The main content area displays a 'Course Details' record for 'MBA'. The 'Details' tab is selected, showing fields for Course Detail Name (MBA), Duration (2), Owner (Pallavi Achari), Created By (Pallavi Achari - 07/07/2023, 5:09 pm), and Last Modified By (Pallavi Achari - 07/07/2023, 5:09 pm). The bottom of the screen shows a Windows taskbar with various icons and system status.

Record for MBA Course with duration 2 years.

- Creating course Details record for course MCA.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for Gmail, YouTube, Maps, Developer Trailmix, Student Dashboard, Data Analytics Corp., Apex Specialist | Sal., My Purchases | Cou..., and Apex Integration Se... The main content area displays a 'Course Details' record for 'MCA'. The 'Details' tab is selected, showing fields for Course Detail Name (MCA), Duration (2), Owner (Pallavi Achari), Created By (Pallavi Achari - 07/07/2023, 5:12 pm), and Last Modified By (Pallavi Achari - 07/07/2023, 5:12 pm). The bottom of the screen shows a Windows taskbar with various icons and system status.

Record for MCA Course with duration 2 years.

- Creating course Details record for course BE.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes tabs for 'Student Dashboard', 'Course Details', and 'b.e full form - Google Search'. Below the navigation is a search bar and a header with icons for 'Candidate Internal ...', 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. The main content area displays a 'Course Details' record for 'BE'. The 'Details' tab is selected, showing fields for 'Course Detail Name' (BE), 'Duration' (4), 'Owner' (Pallavi Achari), 'Created By' (Pallavi Achari, 07/07/2023, 5:14 pm), and 'Last Modified By' (Pallavi Achari, 07/07/2023, 5:14 pm). A banner at the bottom of the page indicates 'Closed road from Bh...'. The Windows taskbar at the bottom shows various pinned apps like File Explorer, Mail, and Google Chrome.

Record for BE Course with duration 4 years.

- Creating course Details record for course BTech.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes tabs for 'Student Dashboard', 'Course Details', and 'b.tech full form - Google Search'. Below the navigation is a search bar and a header with icons for 'Candidate Internal ...', 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. The main content area displays a 'Course Details' record for 'BTech'. The 'Details' tab is selected, showing fields for 'Course Detail Name' (BTech), 'Duration' (4), 'Owner' (Pallavi Achari), 'Created By' (Pallavi Achari, 07/07/2023, 5:15 pm), and 'Last Modified By' (Pallavi Achari, 07/07/2023, 5:15 pm). A success message 'Course Details BTech was created.' is displayed above the form. A banner at the bottom of the page indicates '25°C Cloudy'. The Windows taskbar at the bottom shows various pinned apps like File Explorer, Mail, and Google Chrome.

Record for BTech Course with duration 4 years.

- Creating course Details record for course BSc.

The screenshot shows a Salesforce Lightning page for 'Course Details'. A green success message at the top right says 'Course Details "BSc" was created.' The page displays fields for 'Course Detail Name' (BSc), 'Duration' (3), 'Created By' (Pallavi Achari), and 'Last Modified By' (Pallavi Achari). The top navigation bar includes links for 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. The bottom taskbar has icons for 'New Contact', 'Edit', and 'New Opportunity'.

Record for BSc Course with duration 3 years.

The screenshot shows a list of 'Recently Viewed' course details. The table has columns for 'Course Name' (BSc, BTech, BE, MCA, MBA), 'Duration' (3, 4, 4, 2, 2), and 'Created Date' (07/07/2023, 5:16 pm; 07/07/2023, 5:15 pm; 07/07/2023, 5:14 pm; 07/07/2023, 5:12 pm; 07/07/2023, 5:09 pm). The top navigation bar includes links for 'Candidate Internal ...', 'Candidate App page', 'Course Details', 'Semesters', 'Candidates', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. The bottom taskbar has icons for 'New', 'Import', and 'Change Owner'.

Course Name	Duration	Created Date
BSc	3	07/07/2023, 5:16 pm
BTech	4	07/07/2023, 5:15 pm
BE	4	07/07/2023, 5:14 pm
MCA	2	07/07/2023, 5:12 pm
MBA	2	07/07/2023, 5:09 pm

Course Detail Records of all five courses with duration.

Creating Records for Semester Tab :

The screenshot shows the Salesforce Lightning interface with the 'Semesters' tab selected. The page title is 'Recently Viewed | Semesters'. The main content area displays a table of semester records with columns for 'Semester Name' and 'Course'. The data is as follows:

Row	Semester Name	Course
1	2nd	MBA
2	2nd	BE
3	1st	BE
4	1st	MCA
5	5th	BSc
6	4th	BTech
7	3rd	BE
8	2nd	MCA
9	1st	MBA

Semester Records with semester name and respected courses.

Creating Records for Candidates Tab :

The screenshot shows the Salesforce Lightning interface with the 'Candidates' tab selected. The page title is 'Recently Viewed | Candidates'. The main content area displays a table of candidate records with columns for 'Candidate Name', 'Candidate Roll Number', and 'Semester Name'. The data is as follows:

Row	Candidate Name	Candidate Roll Number	Semester Name
1	Riya Sharma	CAD-004	5th
2	Anjali Gupta	CAD-003	1st
3	Rahul Arora	CAD-002	2nd

Records of Candidate Tab.

Creating Records for Lecturer Details Tab :

Lecturer Details

Recently Viewed

Lecturer Name	Lecturer Role	Course
1 Abhishek Verma		BE
2 Vaishali Thakur		MCA

Records of Lecturer Details Tab.

Creating Records for Internal results Tab :

Internal results

Recently Viewed

Internal Name	Candidate	Course	Marks	Status
1 Internal 2	Riya Sharma	BTech	190	fail
2 Internal 1	Rahul Arora	BSc	250	Pass

Records of Internal results Tab.

8. Reports:

- Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1.Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2.Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3.Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4.Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a sub report with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

- Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

- 1.A Report type cannot include more than 4 objects.
- 2.Once a report is created its report type cannot be changed.

- There are 2 types of report types:

1.Standard Report Types:

- Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked.
- Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

2.Custom Report Types:

- Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.
- In custom report types we can specify objects which will be available in a particular report.
- The primary object must have a relationship with other objects present in a report type either directly or indirectly.
- There are 3 types of access levels of folders:

1.Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

2.Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

3.Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user’s access levels to this folder. Also, users with Manager Access levels can delete the report.

Recent

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Report	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Private Reports	Pallavi Achari	7/7/2023, 6:23 pm	
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	7/7/2023, 11:07 am	

Report Tab Page.

- Here we have created reports for Candidate Internal Report Card App.
- Selected report type as Semesters with Course Details
- For group rows we selected ‘Course Name’ and for in group column Selected Duration.
- And given the Given the report name as Candidate Internal Result Report.

Total Records
9

Course: Course Name	Course: Duration	2	3	4	Total
BE	Record Count	0	0	3	3
BSc	Record Count	0	1	0	1
BTech	Record Count	0	0	1	1
MBA	Record Count	2	0	0	2
MCA	Record Count	2	0	0	2
Total	Record Count	4	1	4	9

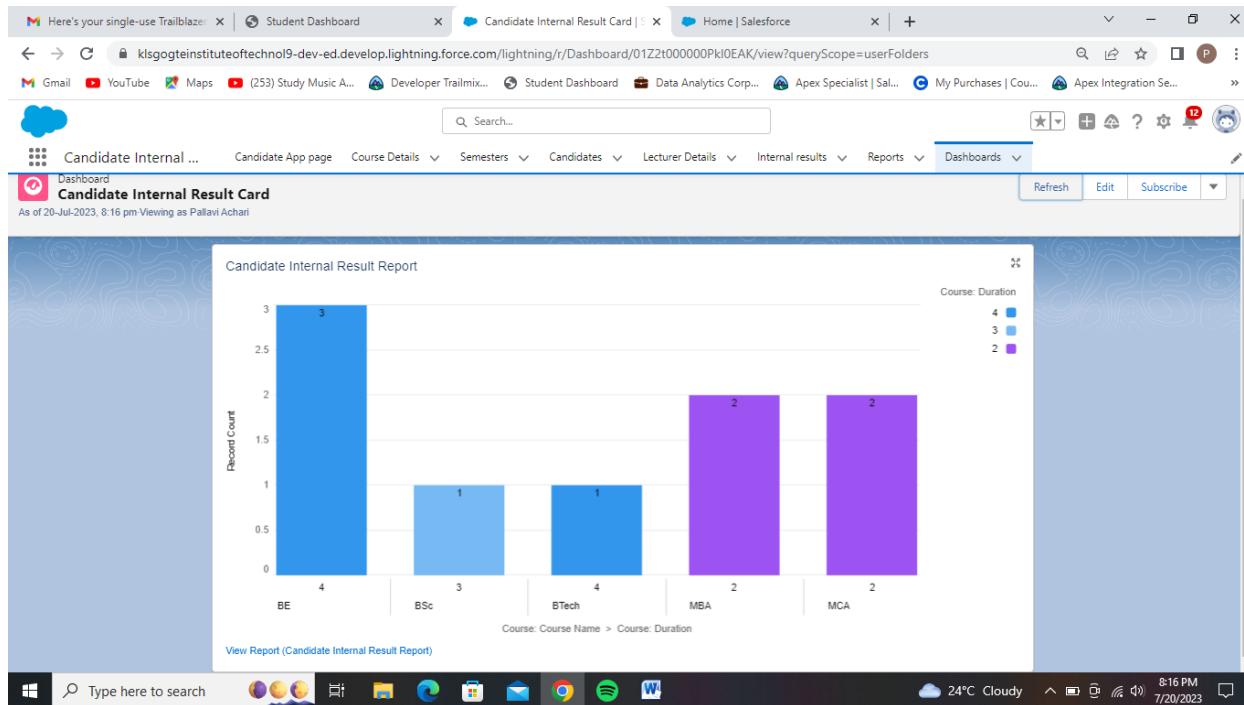
Details (9 Rows) Click an intersection in the table above to filter details.

Semester: Semester Name
1 1st
2 2nd
3 3rd
4 5th
5 4th

Candidate Internal Result Report.

9. Dashboards :

- Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.



Dashboard for candidate Internal Result Card App.

10. Screen Flow :

- Flows are visual representations of business processes in Salesforce that can be developed and managed using the Salesforce Flow Builder. Flows are intended to automate and streamline complicated business operations such as data collection, record updating, and integration with external systems without the use of code.
- Screen flows are flows that are intended to move users through a sequence of screens in order to collect data or show information. They are commonly used to generate user-friendly data entry forms or wizards with input fields, picklists, and other user interface components.

Steps to create Screen flow

1. Click on Gear icon and select setup, In Quick find Box enter flow and select the flows.
2. Click on New flow and Select Screen flow
3. It will open the canvas. Select (+) and Select the screen element from the drop down.
4. It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

Label: Candidate info

API Name: Candidate_Info (This field will be auto populated.)

5. In search Component type text and drag the text component to canva and give the label and Api Name

6. Select (+), In search bar search for Create records and select the create records

7. It will open you the details section and give the label as follows:

Label: Create candidate Records

API Name: Create_candidate_Records

Then check the use separate resources and literal values and Search for candidate Object

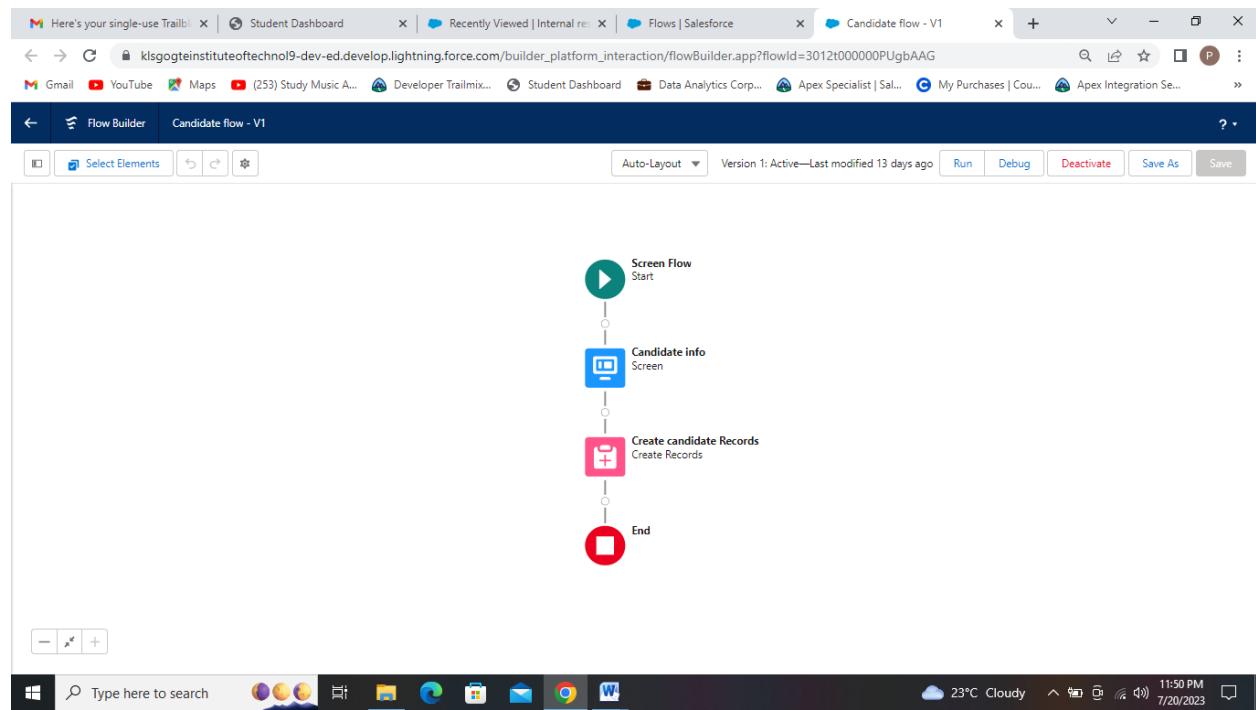
8. Under field type name and select the name and select the candidate_name under Screen Component. And Click on Done.

9. Click on Save. It will open you details canva and give the details as follows.

Flow label: Candidate flow

Flow API Name: Candidate_flow(this will be auto populated)

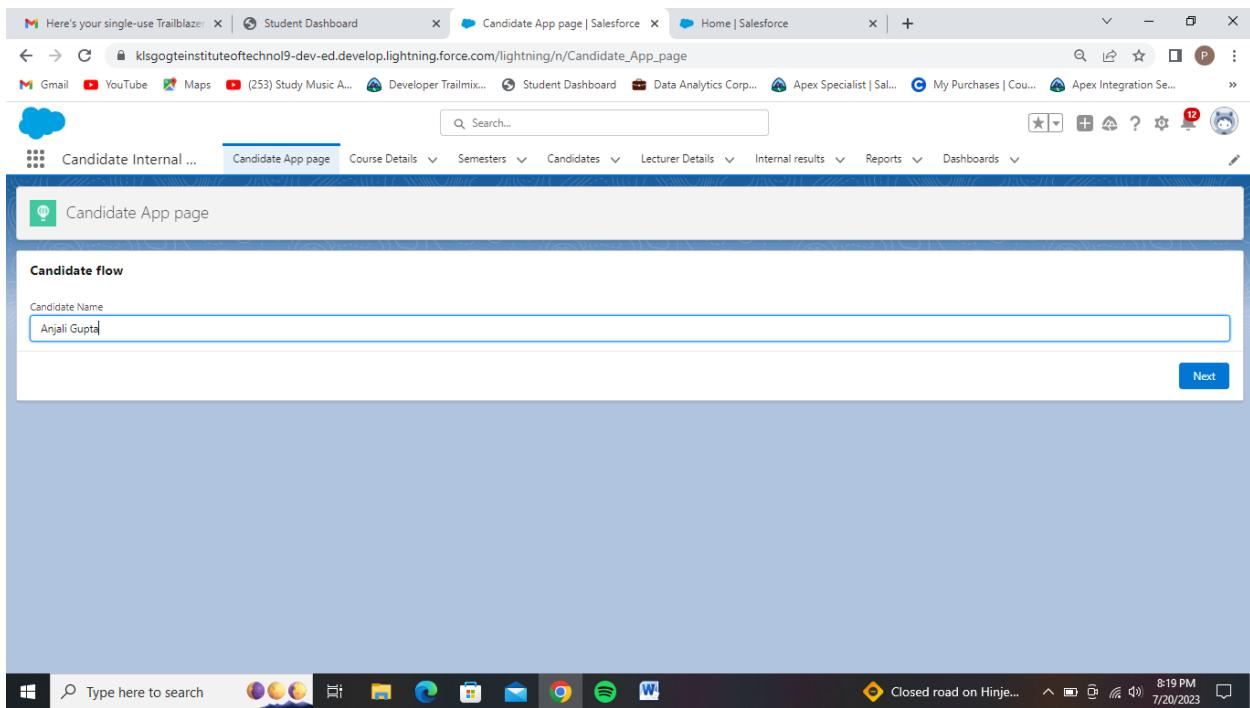
10. Click on save and Click on the Activate.



Candidate Flow.

11. App Page :

App page descriptions in Salesforce refer to the metadata and configuration settings that define the visual layout, functionality, and behavior of custom app pages within a Salesforce org. App pages are created using the Salesforce App Builder, which is a visual drag-and-drop tool that allows users to create custom pages without writing code.



App Page that has Candidate Flow.

- Here we have created Lightning app page for which given a Label as Candidate App page.
- In this page we included Candidate flow component which takes candidates name as input and stores in candidate name field in candidate tab.